

# Collecting Your Due: Fines, Fees, and Invoicing

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# Basic Principle: Quarters versus Dollars

## Overdue Fines

- Accrue 25 cents a day; one day grace period
- Owed to the circulating library, not the owning library
- What is the circulating library?

## Lost, Damaged & related charges

- Owed to owning library
- Declared lost at 45 days overdue
- Marking item lost stops overdue fees from accruing
- Default Price
- \$10 processing fee
- Collection fee



# Simple Billing

- Billing a Patron Account
- Retrieve patron account; select Bills
- Click “Bill Patron”

The screenshot displays a library billing system interface for a patron named Catherine Lemmer (ISL Staff). The interface includes a top navigation bar with buttons like Refresh, Check Out, Items Out, Holds, Bills, Edit, Messages, and Other. The main area is divided into several sections:

- Standing:** Shows "No Blocks/Penalties".
- Status:** Lists various account statuses such as "utobaladmin", "ISL", "Internet Unfiltered", and "Expires on 2013 03 15".
- Summary:** Displays financial details: Net Balance (\$95.00), Payment applied (\$0.00), and New Balance (\$95.00).
- Pay Bill:** Includes fields for Payment Type (Cash), Payment received (\$0.00), Payment applied (\$0.00), and Change (\$0.00).
- Selected Balance:** Shows \$0.00, with Un-Selected at \$95.00 and Voided at \$0.00.
- Information:** Lists items with titles like "Field guide to Indiana wildflowers" and "The bridge knows the way: seeing America through".
- Money Summary:** Provides totals for Total Billed, Total Paid, and Balance Owed for each item.

The "Bill Patron" button is highlighted with a red circle, indicating the next step in the process.

# Simple Billing

- Select option from drop down menu
- Add billing type, amount, note
- Click “Submit this Bill”

The screenshot shows a software window titled "Lemmer (ISL Staff), Catherine : clemmer". Inside the window is a "Create Bill" form. The form contains the following fields:

- Location:** Indiana State Library - Indianapolis
- Transaction Type:** Grocery
- Billing Type:** Postage Reimbursement
- Amount:** 1.01
- Note:** Patron purchased postage stamp

At the bottom right of the form are two buttons: "Cancel" and "Submit this Bill". Red circles are drawn around the input fields (Transaction Type, Billing Type, Amount, and Note) and the "Submit this Bill" button, indicating the steps to be followed.

# Simple Billing

- Confirm patron account updated

Settings Editor | Patron: LEMMER, CATHERINE A.

Refresh Check Out Items Out Holds Bills Edit Messages Other

1 0/0 \$ 98.01

**Summary**  
Net Balance 98.01  
- Payment applied 2.00  
= New Balance 96.01  
  
Bill Patron History

**Pay Bill**  
Payment Type: Forgive  
Payment received 2.00  
- Payment applied  
= Change 0.00  
  
☐ Annotate Payment ☒ Auto-Print

Selected Balances: \$10.00 Un-Selected: \$88.01 Voided: \$0.00 Red Items are still Checked Out

Information	Money Summary	Current Payment
<input checked="" type="checkbox"/> Title: Field guide to Indiana wildflowers Last Billing: Damaged Item Processing Fee <input type="button" value="Full Details"/> <input type="button" value="Add Billing"/> <input type="button" value="Void All Billings"/>	Total Billed: \$10.00 Total Paid: \$0.00 Balance Owed: \$10.00	2.00
<input type="checkbox"/> Title: <span style="color: red;">The bridge knows the way: seeing America through</span> Last Billing: Lost materials <input type="button" value="Full Details"/> <input type="button" value="Add Billing"/> <input type="button" value="Void All Billings"/>	Total Billed: \$85.00 Total Paid: \$0.00 Balance Owed: \$85.00	0.00
<input type="checkbox"/> Type: grocery Last Billing: Fee for lost card <input type="button" value="Full Details"/> <input type="button" value="Add Billing"/> <input type="button" value="Void All Billings"/>	Total Billed: \$2.00 Total Paid: \$0.00 Balance Owed: \$2.00	0.00
<input type="checkbox"/> Type: grocery Last Billing: Postage reimbursement <input type="button" value="Full Details"/> <input type="button" value="Add Billing"/> <input type="button" value="Void All Billings"/>	Total Billed: \$1.01 Total Paid: \$0.00 Balance Owed: \$1.01	0.00

# Damaged: How to Bill

- Step One: Enter Item Barcode on Item Status Screen (F5)

The screenshot shows a web application interface titled "Item Status" in a yellow header. Below the header, there is a "Scan Item" section. In this section, the "Barcode:" label is followed by a text input field containing the value "0000102284957", which is circled in red. To the right of the input field are two buttons: "Submit" and "Upload From File". Further right, there are two links: "Actions for Catalogers" and "Actions for Selected Items". Below these elements is a table with the following headers: "Alert Message", "Barcode", "Call Number", "Due Date", "Location", "Status", and "Title". The table body is currently empty.

Alert Message	Barcode	Call Number	Due Date	Location	Status	Title
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# Damaged: How to Bill

- Step Two:
  - Click “Actions for Selected Items”
  - Select “Mark Item Damaged”

The screenshot displays the 'Item Status' web interface. At the top, a yellow banner reads 'Item Status' and '0000102284957 -- Item is circulating.'. Below this, a 'Scan Item' section includes a 'Barcode:' input field with the value '0000102284957', a 'Submit' button, and an 'Upload From File' button. A table lists item details:

Alert Message	Barcode	Call Number	Due Date	Location	Status	Title
	0000102284957	ISL1582.13 Y35F	2010-05-26	Indiana book	Checked out	Field guide to

On the right, a dropdown menu titled 'Actions for Selected Items' is open, showing various options. The option 'Mark Item Damaged' is highlighted with a red circle. Other options include 'Copy to Clipboard', 'Add to Item Bucket', 'Show in Catalog', 'Show Item Details', 'Show Last Few Circulations', 'Edit Item Attributes', 'Mark Item Missing', 'Abort Transits', 'Check In Items', 'Renew Items', 'Print Spine Label', 'Replace Barcode', and 'Save Columns'.

# Damaged: How to Bill

- Step Three: Authorize the Billing

Charge Patron For Damaged Item?

Item 0000102284957 will be marked damaged. Was returned on 2010-05-05 for Lemmer, JSL Staff. Catherine: clemmer. Charge this patron \$10.00 for the damage?

Options

Item Status						
0000102284957 --						
Scan Item						
Barcode:	<input type="text"/>	<input type="button" value="Submit"/>	<input type="button" value="Upload From File"/>	Actions for Categories Actions for Selected Items		
Alert Message	Barcode	Call Number	Due Date	Location	Status	Title
	0000102284957	ISL S82.13 V35F	2010-05-26	Indians book	Damaged	Field guide to Indiana wildflowers
	0000102284957	ISL S82.13 V35F	2010-05-26	Indians book	Checked out	Field guide to Indiana wildflowers



# Damaged: How to Bill

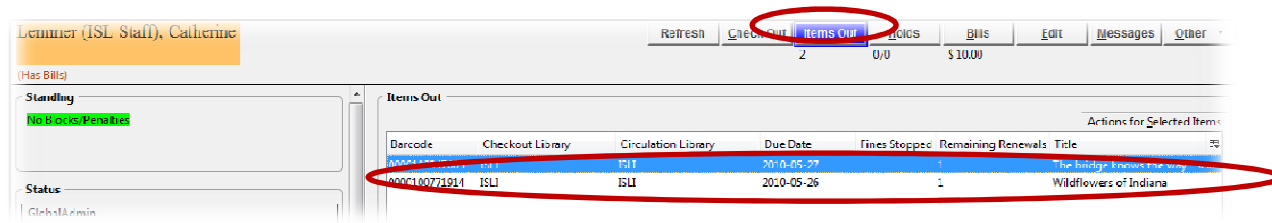
- Step Four: Check the Patron's Account

The screenshot shows a library patron's account page. The top navigation bar includes links like 'Refresh', 'Check Out', 'Items Out', 'Holds', 'Bills', 'Edit', 'Messages', and 'Other'. The 'Bills' link is highlighted. The page is for a patron named Catherine (SLI Staff). The 'Standing' section shows 'No Blocks/Paralties'. The 'Status' section shows 'Global Admin', 'SLI', 'Internet Unfiltered', and 'Expires on 2015-05-13'. The 'Holds' section shows 'Available: 0', 'Bills: \$ 0.00', 'Check Outs: 1', 'Overdue: 0', 'Long Overdue: 0', 'Claimed Returned: 0', 'Lost: 0', and 'Min Cataloged: 0'. The 'Summary' section shows 'Net Balance: 10.00', '- Payment applied: 0.00', and 'New Balance: 10.00'. The 'Pay Bill' section shows 'Payment Type: Cash', 'Payment received: 0.00', '- Payment applied: 0.00', and '= Change: 0.00'. The 'Selected Balance: \$10.00 Un-Selected: \$0.00 Voted: \$0.00' is shown. A red oval highlights the 'Money Summary' table, which shows 'Total Billed: \$10.00', 'Total Paid: \$0.00', and 'Balance Owed: \$10.00'. The 'Current Payment' section shows 'Title: Field guide to Indiana wildflowers', 'Last Billings: Damaged Item Processing Fee', and buttons for 'Full Details', 'Add Billing', and 'Void All Billings'.

Money Summary		Current Payment
Total Billed	\$10.00	
Total Paid	\$0.00	
Balance Owed	\$10.00	

# Lost: How to Bill

- Step One: Retrieve “Items Out” on Patron Screen



# Lost: How to Bill

- Step Two:
  - Click “Actions for Selected Items”
  - Select “Mark Lost (by Patron)”

1 Patron Search 2 Patron: Lemmer (ISL Staff), Catherine 3 Patron: Lemmer (ISL Staff), Catherine

Lemmer (ISL Staff), Catherine

(Has Bills)

Refresh Check Out **Items Out** Holds Bills Edit Messages Other

2 0/0 \$10.00

**Standing**

No Blocks/Penalties

**Status**

GlobalAdmin  
ISLI  
Internet Unfiltered  
Expires on 2013-03-15  
Holds: 0  
Available: 0  
Bills: \$10.00  
Check Outs: 2

**Items Out**

Barcode	Checkout Library	Circulation Library	Due Date	Fines Stopped	Remaining Renewals
0000102947603	ISLI	ISLI	2010-05-27	1	
0000100771914	ISLI	ISLI	2010-05-26	1	

Actions for Selected Items

- Copy to Clipboard
- Add to Item Bucket
- Show in Catalog
- Show Item Details
- Show Last Few Circulations
- Edit Due Date
- Mark Lost (by Patron)**
- Mark Claimed Returned
- Renew
- Renew All

Show Non-Cataloged Circulations in List Above

# Lost: How to Bill

- Item appears on patron's record

Lemmer (ISL Staff), Catherine

Refresh Check Out **Items Out** Holds Bills Edit Messages Other

2 0/0 \$10.00

(Has Bills)

**Standing**  
No Blocks/Penalties

**Status**  
GlobalAdmin  
ISL  
Internet Unfiltered  
Expires on 2013-03-15  
Holds: 0  
Available: 0  
Bills: \$10.00  
Check Outs: 2  
Overdue: 0  
Long Overdue: 0  
Claimed Returned: 0  
Lost: 0  
Non Cataloged: 0

**ID and Contact Information**  
Library Card: clemmer  
ID 1: Other

**Items Out**

Barcode	Checkout Library	Circulation Library	Due Date	Fines Stopped	Remaining Renewals	Title	Actions for Selected Items
0000100771914	ISL	ISL	2010-05-26	1		Wildflowers of Indiana	

Show Non-Cataloged Circulations in List Above

Print Receipt Export

**Lost, Claimed Returned, Long Overdue, Has Unpaid Billings**

Barcode	Checkin Date	Checkout Library	Circulation Library	Fines Stopped	Title	Actions for Selected Items
0000107947603		ISL	ISL	LOST	The bridge knows the way : seeing Am...	

# Lost: How to Bill

- Step Three: Confirm patron account billing

ISLI : Indiana State Library - Indianapolis							
Bill #	8800307	Total Billed	10.00	Title	The bridge knows the way : seeing America through		
Type	circulation	Total Paid	0.00	Checked Out	2010-03-06		
Start	2010-05-06T11:52:11	Balance Owed	10.00	Due Date	2010-05-27		
Finish		Renewal?	No	Checked In			
Item Summary							
Alert Message	Barcode	Call Number	Circulation Library	Location	Owning Library	Status	Total Circ
	0000102947603	ISLI 624 62 T629B	ISLI	Indiana book	ISLI	Lost	1
<a href="#">Alternate View</a> <a href="#">Save Columns</a> <a href="#">Copy to Clipboard</a> <a href="#">Print Export</a>							
Bills							
Amount	Billing Type	Note	Voided	When			
10.00	Lost Materials Processing Fee	SYSTEM GENERATED	No	2010-05-06 12:00			

# Lost: How to Bill

- Step One: No Default Price - Add Billing

Lemmer (ISL Staff), Catherine

Refresh Check Out Items Out Holds Bills Edit Messages Other

(Has Bills)

2 0/0 \$10.00

**Standing**  
No Blocks/Penalties

**Status**  
GlobalAdmin  
ISLI  
Internet Unfiltered  
Expires on 2013-03-15  
Holds: 0  
Available: 0  
Bills: \$10.00  
Check Outs: 2  
Overdue: 0  
Long Overdue: 0  
Claimed Returned: 0  
Lost: 0  
Non Cataloged: 0

**ID and Contact Information**  
Library Card: clemmer

**Summary**  
Net Balance: 20.00  
- Payment applied: 0.00  
= New Balance: 20.00

Bill Patron History

**Pay Bill**  
Payment Type: Cash  
Payment received: 0.00  
- Payment applied: 0.00  
= Change: 0.00

☐ Annotate Payment ☒ Auto-Print

**Selected Balance: \$20.00 Un-Selected: \$0.00 Voided: \$0.00** Red Items are still Checked Out

Information	Money Summary	Current Payment
<input checked="" type="checkbox"/> Title: Field guide to Indiana wildflowers Last Billing: Damaged Item Processing Fee <input type="button" value="Full Details"/> <input type="button" value="Add Billing"/> <input type="button" value="Void All Billings"/>	Total Billed: \$10.00 Total Paid: \$0.00 <b>Balance Owed: \$10.00</b>	0.00
<input checked="" type="checkbox"/> Title: The bridge knows the way : seeing America through Last Billing: Lost Materials Processing Fee <input type="button" value="Full Details"/> <input type="button" value="Add Billing"/> <input type="button" value="Void All Billings"/>	Total Billed: \$10.00 Total Paid: \$0.00 <b>Balance Owed: \$10.00</b>	0.00

# Lost: How to Bill

- Step Two: No Default Price - Add Billing
  - Select billing type from drop down
  - Fill in Price, Notes & Click “Submit This Bill”

Patron Window  
Clemmer (ISL Staff), Catherine : clemmer

Summary

BILL #	8601907	Total Billed	10.00	Title	The bridge knows the way : seeing America through covered bridges
Type	circulation	Total Paid	0.00	Checked Out	2010-05-26
Start	2010-05-06T11:52:11	Balance Owed	10.00	Due Date	2010-05-27
End		Reviewed?		Checked In	

Create Bill

Location: Indiana State Library - Indianapolis

Transaction Type: Circulation

Billing Type: Lost (circulation)

Amount: 75.00

Note: Lost book; price confirmed with Tech Services

Cancel Submit This Bill

# Lost: How to Bill

- Step Three: No Default Price - Add Billing  
— Confirm Billing On Patron Account

Demmer (ISL Staff), Catherine

(Has Bills)

Standing

No Blocks/Penalties

Status

GlobalAdmin  
ISL  
Internet Unfiltered  
Expires on 2013-03-15  
Holds: 0  
Available: 0  
Bills: \$ 95.00  
Check Outs: 1  
Overdue: 0  
Long Overdue: 0  
Claimed Returned: 0  
Lost: 1  
Non Cataloged: 0

ID and Contact Information

Refresh Check Out Items Out Holds Bills Edit Messages Other

Item Summary

Alert Message	Barcode	Call Number	Circulation Library	Location	Owning Library	Status	Total Circs
	0000102947603	ISL1624.62 T629B	ISL	Indiana book	ISL	Lost	1

Alternate View Save Columns Copy to Clipboard Print Export

Bills

Amount	Billing Type	Note	Voided	When
10.00	Lost Materials Processing Fee	SYSTEM GENERATED	No	2010-05-06 12:00
75.00	Lost materials	Lost book; price confirmed with Tech Services	No	2010-05-06 13:00

Last Billings: Damaged Item Processing Fee

Total Paid: \$0.00  
Balance Owed: \$110.00

Full Details Add Billing Void All Billings

Title: The bridge between the way seeing America through

Last Billings: Lost materials

Total Billed: \$85.00  
Total Paid: \$0.00  
Balance Owed: \$85.00

Full Details Add Billing Void All Billings

Item Summary

Alert Message	Barcode	Call Number	Circulation Library	Location	Owning Library	Status	Total Circs
	0000102947603	ISL1624.62 T629B	ISL	Indiana book	ISL	Lost	1

Alternate View Save Columns Copy to Clipboard Print Export

Bills

Amount	Billing Type	Note	Voided	When
10.00	Lost Materials Processing Fee	SYSTEM GENERATED	No	2010-05-06 12:00
75.00	Lost materials	Lost book; price confirmed with Tech Services	No	2010-05-06 13:00



# Lost Item: How to Bill

- Set the default price
- Admin>Local Administration>Library Settings
- Click Edit
- Fill in a price (value), Click Update Settings

### Organization Unit Settings

Context Location  \* Indicates the setting is not inherited from the parent org unit at run time

Edit	Setting	Context	Value
<a href="#">Edit</a>	Alert on empty bib records		
<a href="#">Edit</a>	Allow Credit Card Payments		
<a href="#">Edit</a>	Change reshelfing status interval *		
<a href="#">Edit</a>	Charge item price when marked damaged		
<a href="#">Edit</a>	Charge processing fee for damaged items	EG-IN	10.00
<a href="#">Edit</a>	Circ: Lcs: Items usable on checkin		
<a href="#">Edit</a>	Circ: Restore overdue on lcs: item return	EG-IN	True
<a href="#">Edit</a>	Circ: Void lost item billing when returned	EG-IN	False
<a href="#">Edit</a>	Circ: Void lost max interval		
<a href="#">Edit</a>	Circ: Void processing fee on lost item return	EG-IN	False
<a href="#">Edit</a>	Default Item Price		
<a href="#">Edit</a>	Default Locale		
<a href="#">Edit</a>	Do not automatically delete empty bib records		
<a href="#">Edit</a>	GUI: Above-Tab Button Bar		

<a href="#">Edit</a>	Charge item price when marked damaged			
<a href="#">Edit</a>	Charge processing fee for damaged items	EG-IN		10.00
<a href="#">Edit</a>	Context:	EG-IN		True
<a href="#">Edit</a>	Context:	EG-IN		False
<a href="#">Edit</a>	Context:	EG-IN		False
<a href="#">Edit</a>	Context:	EG-IN		False
<a href="#">Edit</a>	Value			
<a href="#">Edit</a>	<a href="#">Delete Setting</a>	<a href="#">Update Setting</a>		
<a href="#">Edit</a>	GU: Show-Tab Button Bar			
<a href="#">Edit</a>	GU: Attention Horizontal Patron Summary Panel			

# What's Mine; What's Yours?

- Step One
- Retrieve the Patron Account
- Select Bills

The screenshot shows a web application interface for managing a patron's account. At the top, there is a navigation bar with buttons: Refresh, Check Out, Items Out, Hold, Bills (highlighted with a red circle), Edit, Messages, and Other. Below the navigation bar, the 'Bills' section is active, displaying a summary of the patron's account. The summary includes a Net Balance of \$5.50, a Payment applied of 0.00, and a New Balance of \$5.50. To the right, there is a 'Pay Bill' section with a Payment Type dropdown set to 'Cash', and fields for Payment received (0.00), Payment applied (0.00), and Change (0.00). Below the summary, there are buttons for 'Bill Patron' and 'History'. The main area displays a list of bills with columns for Title, Last Billing, and Money Summary. The bills are as follows:

Information	Money Summary	Current Payment
<input checked="" type="checkbox"/> Title: Arthurian legends Last Billing: Overdue materials Full Details Add Billing Void All Billings	Total Billed: \$1.00 Total Paid: \$0.00 Balance Owed: \$1.00	0.00
<input checked="" type="checkbox"/> Title: World's beginning Last Billing: Overdue materials Full Details Add Billing Void All Billings	Total Billed: \$0.50 Total Paid: \$0.00 Balance Owed: \$0.50	0.00
<input checked="" type="checkbox"/> Title: Amazons of black Sparta the women warriors of Dahia Last Billing: Overdue materials Full Details Add Billing Void All Billings	Total Billed: \$0.00 Total Paid: \$0.00 Balance Owed: \$2.00	0.00
<input checked="" type="checkbox"/> Title: grocery Last Billing: Miscellaneous Full Details Add Billing Void All Billings	Total Billed: \$1.00 Total Paid: \$0.00 Balance Owed: \$1.00	0.00
<input checked="" type="checkbox"/> Title: Provenance: how a con man and a forger rewrote the Last Billing: Overdue materials Full Details Add Billing Void All Billings	Total Billed: \$0.75 Total Paid: \$0.00 Balance Owed: \$0.75	0.00

At the bottom of the interface, there are buttons for 'Uncheck All', 'Check All', 'Print Bills', and 'Alternate View'.

# What's Mine; What's Yours?

## Example

Item Checked out at Fulton County

Renewed via OPAC or from Patron's Home Computer, fines owed to Hussey-Mayfield

<b>Summary</b>					
<b>HMMPL : Hussey-Mayfield Memorial Branch</b>					
Bill #	3725420	Total Billed	1.00	Title	Arthurian legends
Type	circulation	Total Paid		Checked Out	2009-08-04
Start	2009-08-04T14:40:16	Balance Owed	1.00	Due Date	2009-08-18
Finish		Renewal?	OPAC	Checked In	2009-08-22

<b>Item Summary</b>								
Alert Message	Barcode	Call Number	Circulation	Library	Location	Owning Library	Status	Total Circs
	33187002091102	ART	FCPLR		Ya Science Fiction/Fant...	FCPLR	Available	3
<a href="#">Alternate View</a> <a href="#">Save Columns</a> <a href="#">Copy to Clipboard</a> <a href="#">Print Export</a>								

<b>Bills</b>				
Amount	Billing Type	Note	Voided	When
.25	Overdue materials	System Generated Overdue Fine	No	2009-08-19 00:00

# What's Mine; What's Yours?

## Another Example

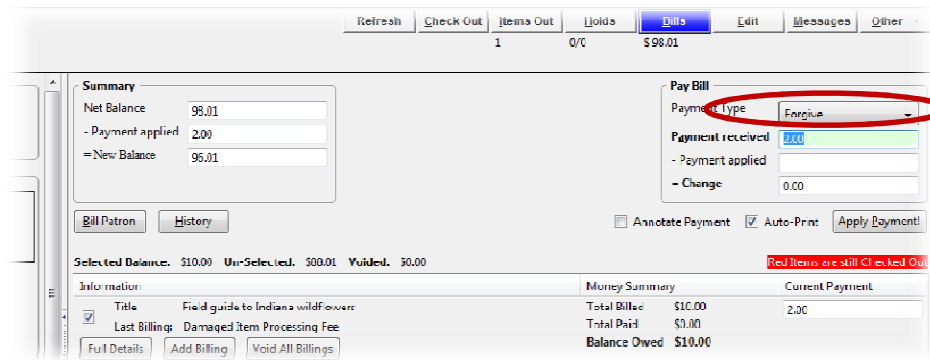
Item Checked out at Noble County

Renewed at Brazil, fines owed to Brazil

Summary						
ZPLB : Brazil Public Library						
Item #	4570272	Total Billed		Title	Amazons of Black Sparta the women warriors of Delphi	
Type	Circulation	Total Paid		Checked Out	2009-10-05	
Start	2009-10-05T15:24:51	Balance Owed	2.00	Due Date	2009-10-26	
Finish		Renewal?	DESK	Checked In	2009-11-06	
Item Summary						
Alert Message	Barcode	Call Number	Circulation Library	Location	Owning Library	Status
	381 31007543516	355 3 A1 D	NCDLC	Non-fiction	NCDLC	Available
Alternate View	Save Columns	Copy to Clipboard	Print Export			

# Recording the Payment

- Never use “void”
- Use “forgive” or “waive”
- May only “forgive” or “waive” fees owed to our library



The screenshot displays a library billing system interface. At the top, there are tabs: Refresh, Check Out, Items Out, Holds, Bills (selected), Edit, Messages, and Other. Below the tabs, a summary section shows: 1 item, 0/0 holds, and a total of \$98.01. The 'Summary' section includes fields for Net Balance (98.01), Payment applied (2.00), and New Balance (95.01). A 'Pay Bill' window is open, showing a 'Payment type' dropdown menu with 'Forgive' selected, circled in red. Other fields in the 'Pay Bill' window include Payment received (0.00), Payment applied, and Change (0.00). Below the 'Pay Bill' window, there are checkboxes for 'Annotate Payment' and 'Auto-Print', and an 'Apply Payment!' button. A red warning message states 'Red items are still checked out'. The bottom section shows 'Selected Balance: \$10.00', 'Un-Selected: \$80.01', and 'Voided: \$0.00'. The 'Information' section lists the title 'Field guide to Indiana wildflowers' and the last billing 'Damaged Item Processing Fee'. The 'Money Summary' section shows: Total Billed \$10.00, Total Paid \$0.00, and Balance Owed \$10.00. The 'Current Payment' section shows a payment of 2.00.

Summary	
Net Balance	98.01
- Payment applied	2.00
= New Balance	95.01

Pay Bill	
Payment type	Forgive
Payment received	0.00
- Payment applied	
- Change	0.00

Money Summary	
Total Billed	\$10.00
Total Paid	\$0.00
Balance Owed	\$10.00

Current Payment	
Payment	2.00

# Recording the Payment

- Example: Patron returns item marked “lost”

Lemmer (ISL Staff), Catherine

Refresh Check Out **Items Out** Holds Bills Edit Messages Other

1 0/0 \$96.01

(Has Bills)

**Standing**  
No Fines/Penalties

**Status**  
GlobalAdmin  
ISL  
Internet Unfiltered  
Expires on: 2013-03-15  
Holds: 0  
Available: 0  
Bills: \$96.01  
Check Outs: 1  
Overdue: 0  
Long Overdue: 0  
Claimed Returned: 0  
Lost: 1  
Non Cataloged: 0

**ID and Contact Information**  
Library Card: Lemmer  
ID 1: Other

**Items Out**

Barcode	Checkout Library	Circulation Library	Due Date	Fines Stopped	Remaining Renewals	Title
00001007/1914	ISL	ISL	2010-05-26	1		Wildflowers of Indiana

Show Non-Cataloged Circulations in List Above

Print Receipt Export

**Lost: Claimed Returned, Long Overdue, Has Unpaid Billings**

Barcode	Checkin Date	Checkout Library	Circulation Library	Fines Stopped	Title
0000102947803		ISL	ISL	LOST	The bridge knows the way: seeing Am...

# Recording the Payment

- Retrieve patron account; select Bills
- **Forgive** the cost of the lost item and processing fee
- DO NOT Void

The screenshot shows a library billing system interface. At the top, there are tabs: Refresh, Check Out, Items Out, Holds, Bills (selected), Edit, Messages, and Other. Below the tabs, the current bill number is 1, with 0/0 items out and a total of \$96.01.

The main section is divided into two parts. On the left, the 'Summary' section shows:

Net Balance	96.01
- Payment applied	85.00
New Balance	11.01

Below the summary are buttons for 'Bill Patron' and 'History'. On the right, the 'Pay Bill' section is highlighted with a red circle. It contains a 'Payment Type' dropdown menu set to 'Forgive', a 'Payment received' field with 85.00, a '- Payment applied' field with 85.00, and a '- Change' field with 0.00. There are also checkboxes for 'Annotate Payment' and 'Auto-Print', and an 'Apply Payment!' button.

Below the 'Pay Bill' section, the 'Selected Balance' is \$85.00, 'Un-Selected' is \$11.01, and 'Voided' is \$0.00.

The bottom section is a table with two columns: 'Information' and 'Money Summary'. The 'Information' column has a checkbox next to the 'Title' field, which is circled in red. The 'Money Summary' column shows the total billed, total paid, and balance owed for each item.

Information	Money Summary	Current Payment
<input type="checkbox"/> Title: Field guide to Indiana wildflowers Last Billing: Damaged Item Processing Fee Buttons: Full Details, Add Billing, Void All Billings	Total Billed: \$10.00 Total Paid: \$2.00 Balance Owed: \$8.00	0.00
<input checked="" type="checkbox"/> Title: The bridge knows the way: seeing America through Last Billing: Lost materials Buttons: Full Details, Add Billing, Void All Billings	Total Billed: \$85.00 Total Paid: \$0.00 Balance Owed: \$85.00	85.00

# Recording the Payment

- Resolving the bill removes the item from patron's account

The screenshot shows a library management system interface. At the top, there are tabs: Refresh, Check Out, Items Out (selected), Holds, Bills, Edit, Messages, and Other. Below the tabs, there are statistics: 1, 0/0, and \$11.01. The main section is titled 'Items Out' and contains a table with the following data:

Barcode	Checkout Library	Circulation Library	Due Date	Fines Stopped	Remaining Resources	Title
000010071914	ISLI	ISLI	2010-05-26	1		Wildflowers of Indiana

Below the table, there is a button labeled 'Show Non-Cataloged Circulations in List Above'. To the right of the table, there are buttons for 'Print Receipt' and 'Export'. At the bottom, there is a section titled 'Lost, Claimed Returned, Long Overdue, Was Onpaid Billings' which is circled in red. This section contains a table with the following data:

Barcode	Checkin Date	Checkout Library	Circulation Library	Fines Stopped	Title
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# Future Options

- Constrained by current law until July 1
- Future Payment Options
  - Collect any amount due
  - Centralized reconciliation report run
  - Importance of default prices and updating replacement costs for items marked lost and/or 45 days overdue

# Print and Email Notices

- Email Notices
  - 3 day pre due date
  - Date due

- Print Notices

- 14 days
  - 28 days
  - 45 days

- URL – Print notices

<https://evergreen.lib.in.us/notices/xxxx/index.html>

- URL – Print notices tutorial

[http://www.in.gov/library/files/How\\_to\\_Access\\_Library\\_Overdue\\_Print\\_Notices.pdf](http://www.in.gov/library/files/How_to_Access_Library_Overdue_Print_Notices.pdf)

# Questions?

